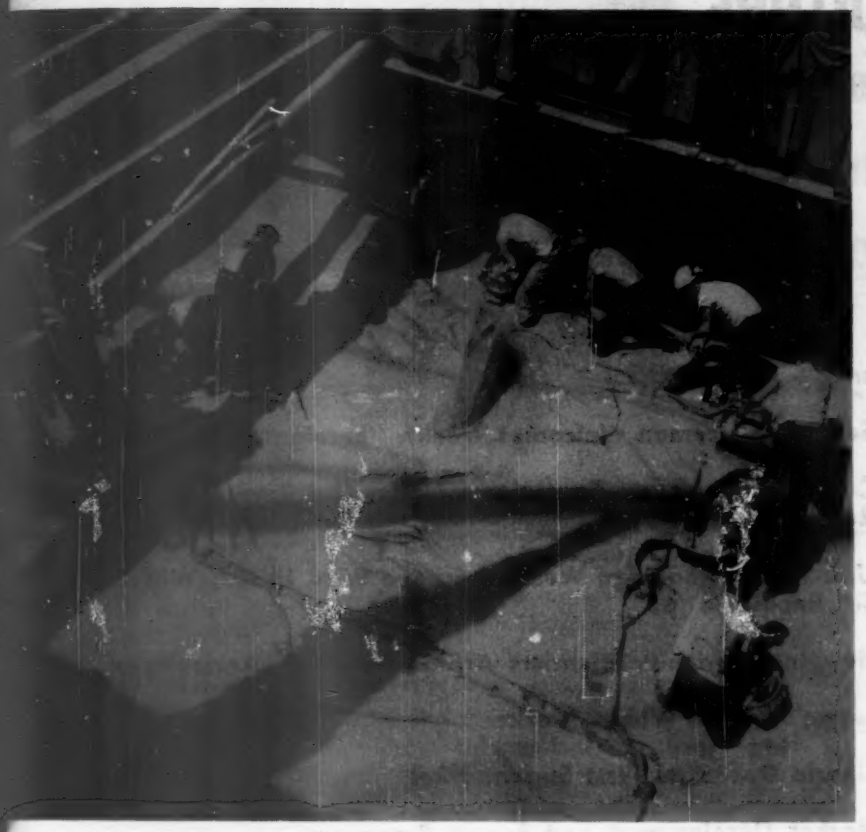
JANUARY 7, 1963



Secretary Freeman, on Public's "Need To Know"

Cuba's Agriculture: 4 Years Under Castro

International Scientists Aid U.S. Agriculture

FOREIGN AGRICULTURE

Including FOREIGN CROPS AND MARKETS

THE UNIVERSITY OF MICHIGAN

PERIODICAL READING ROOM

A WEEKLY MAGAZINE OF THE UNITED STATES DEPARTMENT OF AGRICULTURE
FOREIGN AGRICULTURAL SERVICE

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Including FOREIGN CROPS AND MARKETS

JANUARY 7, 1963
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U.S. wheat in Japan

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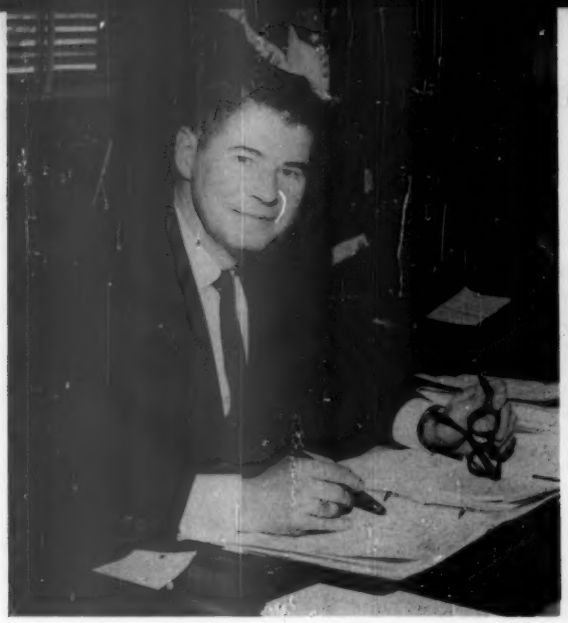

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Secretary Freeman Welcomes Weekly "Foreign Agriculture"

Knowledge is the foundation of all progress. The supplying of useful knowledge has been a dominant activity of the Department of Agriculture since its founding a century ago.

In that spirit, I welcome this new weekly *Foreign Agriculture* to the impressive number of public services rendered by this Department.

The "need to know" is a commanding requirement in our modern society. Once it was enough to know what was going on in our immediate community, or our state, or our nation. Today we must know what is going on throughout the world. It is the objective of this new magazine to help fulfill this need.

Foreign Agriculture magazine, like its parent agency, the Foreign Agricultural Service, is part of a strong, purposeful effort being made to help the United States carry out its leading role in world agricultural affairs.

We are the world's largest exporter of agricultural products. We can carry out this mammoth responsibility only by keeping currently informed as to our export problems and our market development opportunities and requirements.

Similarly, we are the world's second largest importer of agricultural products. Here again, it is essential that as we buy on the world market, we do so on a fully informed basis.

We are the most active of all nations in sharing not only our products but also our agricultural know-how with the newly developing nations. Again, the need for and the results of this sharing must be made known to all of us.

The great international trade developments—the European Common Market, trade agreement programs, commodity agreements, and the emerging trade policies of individual nations and groups of nations—must be common knowledge to us for they vitally affect our own trade position.

In the great competition between democracy and communism, we know that our agricultural achievements make one of the key differences between these systems—communist agriculture cannot begin to compete with American farmers. But it is not enough to know that our system is better; we must constantly be informed as to why and how much it is better.

In these and other ways, this new *Foreign Agriculture* will keep its readers currently informed of world agricultural events, their effect on us, our participation in them, and our own influence upon them.

In performing this service we have the active participation of our corps of agricultural attachés who report regularly from more than 100 foreign countries and our complement of commodity, trade, and foreign research analysts who report from Washington. It is our hope that through this service our Nation can participate even more effectively in this International Age of Agriculture.

—ORVILLE L. FREEMAN

CUBA'S Agriculture: four years under the revolutionary regime

By LEON G. MEARS
Western Hemisphere Branch
Economic Research Service

Cuba's food shortages are such that fruit vendors, once prevalent, are no longer seen on the streets.

Four years ago this month the Fidel Castro Government assumed power in Cuba. At that time farm production accounted for over one-third of the national income and furnished employment for about two-fifths of the labor force. Food supplies were adequate for Cuba's 6.5 million people, and agricultural exports brought in most of the country's foreign exchange earnings.

Quite a different situation prevails today. The island is now in the midst of an agricultural crisis, with no break in sight. Food supplies are insufficient, and as a result, per capita consumption has dropped one-fifth since 1958, with most of the decline coming in the last 18 months.

These food shortages—and the rationing now in effect—are the product of agricultural output well below the 1958 level. They also result from reduced food imports, mismanagement in food marketing, and a shift in trade from the United States to the Sino-Soviet Bloc. Last year the value of Cuba's farm exports was down some 30 to 35 percent from 1958 levels, and farm imports were equally low.

Farm output falls

All was not well in Cuba's agriculture before 1958. Yet despite the evils that stem from an economy geared to the production of a single export commodity, i.e., sugar, and largely dependent on foreign markets, Cuban agriculture was growing at a rapid pace. Farm output in the late 1950's was twice that of 1935-39. During these two decades, the growth (compound) rate averaged 3.5 percent a year, and excluding sugar was nearer 4 percent. This was significantly higher than the average population growth of about 2.3 percent.

First signs of disruption appeared within a year after Castro assumed power. The uncertainties caused by the swift nationalization of farm property under the Agrarian Reform Law of 1959 led to a drop in output. Meat production in particular fell off sharply as a result of the excessive and indiscriminate slaughter of livestock in 1959 and early 1960.

The radical shift in foreign trade in 1960 also hampered production by making it necessary to locate new sources of supply for farm machinery, fertilizers, insecticides, and seeds, which formerly had been imported for the most part from the United States. But by early 1961 the agitation over the Reform Law had subsided somewhat, and some adjustment had been made to the country's new trade partners. At this point labor, management, and distribution problems became the major obstacles—and have remained so ever since.

More concretely the story of these 4 years is told by the country's agricultural index. In 1957/58, the per capita agricultural production index stood at 111 (1952-53/1954-55 = 100). In 1961/62, it fell to 87.

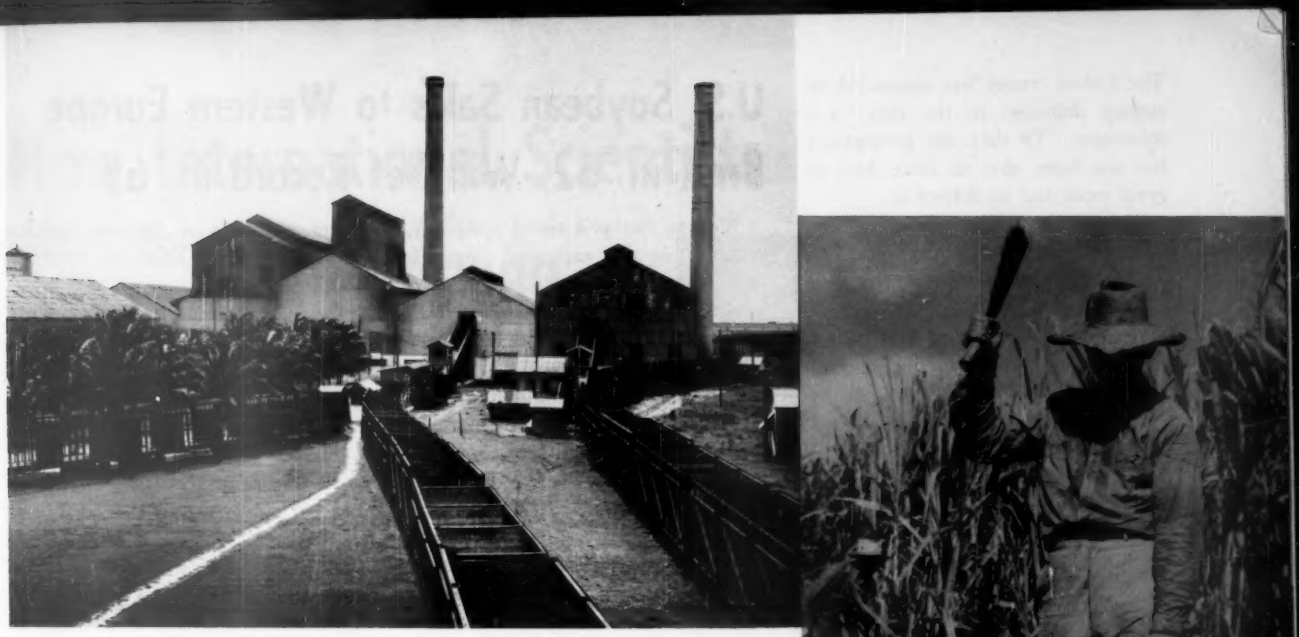
Food shortages develop

In 1958, Cuba's daily per capita food consumption, estimated at 2,870 calories, was not only above the average minimum standard for Latin America but ranked third highest, with adequate amounts of fats and proteins. Food supplies stayed fairly good through 1959, but this period of relative abundance was short lived. By early 1960 food shortages were cropping up.

As the scarcities grew, the Cuban Government began rationing. Fats went on the ration list in July 1961 and were soon followed by certain meats. The shortages continued, and early in 1962 public speculation became such a problem that almost all of the major foods were placed under rationing. A further deterioration of the food situation apparently took place, for last October the government announced additional food-rationing measures.

Land reform disappointing

Even before Castro took over, Cuba's land tenure system was badly



Above, sugar plant during off season, and right, cutting the cane by hand. Sugar crop this year will be lowest in years.

in need of an overhaul. Yet nothing has been more disappointing than Cuba's so-called agrarian reform. It has not only disrupted production but has failed to fulfill government promises and to meet the needs and expectations of the rural people.

The Revolutionary Government's Agrarian Reform Law of 1959 prohibits large, privately owned estates and absentee ownership and provides for indemnity for expropriated property. According to the law, the expropriated land was primarily for "distribution among peasants and agricultural workers who had no land." The law also created the National Agrarian Reform Institute (INRA) to handle all matters pertaining to land reform, agricultural production, credit, commerce, and trade.

Expropriation proceedings moved swiftly after the proclamation of the reform law. First to come under state ownership were the large cattle ranches and rice plantations. INRA announced that, in order to protect the 1960 harvest and the planting and cultivation for the 1961 crop, the large sugar estates would not be immediately intervened. In the summer and fall of 1960 all the large sugar estates came under state ownership.

Contrary to the law, the large, privately-owned estates were expropriated without indemnification. Also, very little of the land was distributed to landless farmers.

Most of the land that had been nationalized through 1960 was organized into production "cooperatives" owned and operated by the state. Then beginning in early 1961, these units were gradually transformed into "peoples farms," which in many respects resemble the cooperatives but differ in that the workers are paid a daily wage. They also receive fringe benefits, such as housing, free utilities, and certain services. The land and all property are still state-owned.

The Castro government has stated on several occasions that the future of Cuban agriculture lies with collectivity, and last year the trend was in this direction. Most significant was the swift formation of peoples farms and the widespread campaign encouraging private farmers to join these units. Indicative too was INRA's favoring the peoples farms in granting credit, and supplying seeds, machinery, and other farm requisites.

By mid-August 1962 all of the cooperatives had been converted into peoples farms, and today there are some 900 of them, employing over 250,000 wage workers and accounting for 45 percent of Cuba's farmland. Independent farmers are decreasing in number, for they find it more and more difficult to survive in a milieu where they are considered a marginal element within collectivization.

Labor headaches

The drop in Cuban farm output, as mentioned earlier, cannot be blamed entirely on collectivization and the radical shift in foreign trade. Today labor and management are the major headaches, and unless the Cuban Government can apply a remedy, the current food crisis will worsen.

The biggest portion of Cuba's domestic food output still comes from the small and medium-size privately owned farms. These produce the corn, sweet potatoes, malanga, yuca, plantains, and similar foodstuffs that the Cubans eat—and that currently are in short supply—and they have always done it without benefit of fertilizer, irrigation, or modern machinery. In fact, before 1959, Cuba was normally a net exporter of these commodities, so why are there shortages now?

One answer is the state purchase system. In 1960, the Castro Government implemented a rigid system of state purchase of practically all farm produce—frequently at low prices.

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One answer is the state purchase system. In 1960, the Castro Government implemented a rigid system of state purchase of practically all farm produce—frequently at low prices.

The Cuban farmer has responded by cutting deliveries to the state to a minimum. To date the government has not been able to force him to grow more and to deliver it.

Things are faring worse on the large peoples farms, where most of the sugar-cane, rice, tobacco, and livestock is produced. Output is hampered by an apathetic and indifferent labor force and inexperienced management. Wages are not commensurate with the work, and consequently there is little enthusiasm to produce. Furthermore, many of the administrators are appointed for political reliability rather than managerial ability, and they in turn are harrassed by the INRA.

Prospects dim

Weighing Cuba's agricultural troubles, one cannot be very optimistic about the country's food situation for the next few months. Most of its food crops are harvested in the fall, and last year's harvest fell far short of expectations. (Despite Cuban reports of a large rice crop, no changes have been made in the rice ration.) Meat and milk output will probably decline, as they usually do during the dry season which began last month.

Prospects for the year are no better. Domestic food output in 1963 is not likely to gain over last year's low level. This, together with the possibility of reduced imports, could lead to a further deterioration of the food situation.

Certainly, increased production for export appears negative. Although the weather has been favorable in recent months, the 1963 sugar harvest, now underway, is expected to dip below 4.6 million short tons—a drop of over 10 percent from last year's poor crop and the lowest since the war.

This then is what has happened to Cuba's agriculture—and it may be the most significant product of the Castro Government's 4 years in office. Even the rural people who were carried away by the early promises of land for the landless see the consequences. Their once-prosperous agriculture is deteriorating, and their island, often called "the pearl of the Antilles," has become a land of growing food shortages where tightening the belt is now the normal way of life.

U.S. Soybean Sales to Western Europe Brisk in '62, Will Set Record in '65

Western Europe's rising prosperity, reflected in its expanded livestock and poultry industries, points to a considerably larger market for U.S. soybeans and soybean meal within the next few years.

These increased shipments will be absorbed largely by Western Europe's rapidly growing mixed feeds industry. Stimulated by consumer demand for meat, livestock industries are increasing their numbers and improving the rations of hogs, poultry, and cattle. Soybeans and soybean meal, important to the quality and efficiency of mixed feeds, will be needed in greater amounts. By 1965, the mixed feeds industry is expected to produce 40 million metric tons of mixed feed, as compared to 30 million in 1962.

Potential buyers

The biggest boom is anticipated in soybean meal exports. By 1965, Western Europe could be taking nearly 1.5 million metric tons of U.S. soybean meal, an increase of 85 percent over U.S. exports of 800,000 tons in 1962. Our biggest potential customers for soybean meal will be France, West Germany, the Netherlands, Belgium, Spain, and Denmark.

France's growing poultry and hog industries, plus the anticipated improvement in feeding practices, should make that country the largest market for U.S. soybean meal exports. France may be taking 400,000 tons of soybean meal in 1965, as against 175,000 tons in 1962.

West Germany and the Netherlands will remain good customers for our meal, as their mixed feeds industries will need 200,000 tons in 1965, 50,000 more than 1962 exports.

Denmark's crushing industry is operating at near capacity. In 1962 Denmark took 75,000 tons of soybean meal, and prospects are good that by 1965, it will double that amount.

Now in the process of revitalizing its poultry and mixed feeds industry, Spain is expected to import 150,000 to 200,000 tons of soybean meal by 1965, most of it from the United States. Imports in 1962 are expected to be well above those of 1961, or about 50,000 tons.

Belgium continues to be an important outlet for U.S. soybean meal, and exports to that country may be expected to expand from 90,000 tons in 1962 to 150,000 tons in 1965.

The United Kingdom took only a small amount of U.S. soybean meal in 1962 to supply its mixed feeds industry, largest in Western Europe. Should the United Kingdom join the Common Market, however, its present high tariff of 15 percent may be reduced, allowing the United States a bigger share of the British market by 1965. Sales of soybean meal to Italy have been good in the past few years, but will not increase significantly if Italian crushers meet their goal of producing enough meal domestically.

Beans to gain too

Soybean exports will also enjoy this growing European market, but because of the limited demand for additional edible fats and oils, they will not share the same boom as U.S. soybean meal. U.S. soybean exports to Western Europe could increase 40 percent —from 90 million bushels in 1962 to nearly 125 million bushels in 1965. About half of the soybeans imported will be crushed locally to supply meal to the mixed feeds industry. Volume will vary from country to country, depending on the capacity of the local crushing industry and the ability of the country to market soybean oil in domestic and foreign markets.

West Germany takes the largest amount of U.S. soybeans—1 million tons last year—and is expected to take an additional 200,000 by 1965. The Netherlands and Denmark, now buying 350,000 tons each from the United States, will probably buy 500,000 and 450,000 respectively by 1965. A big jump is anticipated in Italian sales —from 300,000 tons to 500,000 by 1965. To be doubled are U.S. soybean exports to Belgium, France, and the United Kingdom, as crushing mills in those countries improve.

How International Scientists Are Serving U.S. Agriculture

By H. W. MARSTON, *Assistant Director*

Foreign Research and Technical Programs Division
Agricultural Research Service

A Polish researcher holds bottles of artificial foods. If mites find one attractive, it could be used in the control of these insects which damage stored products.

The United States is tapping the brains and know-how of some of the world's leading scientists, using foreign currencies earned by the sale of surplus American commodities under P.L. 480. These funds, which cannot be converted into dollars for use in this country, have enabled the U.S. Department of Agriculture to contract for 345 research projects in 24 countries since the program began in mid-1958.

All projects must meet the basic criterion that they benefit U.S. agricultural producers and processors, as well as those of participating countries. No grants are awarded for research on problems that would intensify competition on the international market for our own agricultural products. We do not, for instance, finance work on the development of higher yielding hybrids of cotton or wheat.

A research proposal may originate in a foreign country or at USDA, where the program is administered by the Foreign Research and Technical Programs Division of the Agricultural Research Service. Technical aspects of each agreement are supervised by the research agency responsible for the particular type of research.

Basic research emphasis

The program includes both basic and applied research, but the stress is on fundamental studies because it is in this area that foreign scientists have made some of their most noteworthy contributions. Types of projects now underway are generally classified under utilization, forestry, farm production, human nutrition, marketing, and economics.

One hundred and eighteen utilization projects are now being carried out in 15 countries. In Finland, for example, the biochemistry of the transmission of flavor constituents from the feed of dairy cattle to their milk is being studied. Since milk flavor is an important quality factor, it is desirable to know the chemical changes and the biological process by which undesirable constituents of feed find their way into milk. This knowledge will be valuable in controlling the off-flavors of milk.

Another utilization project is the processing of soybean oil to improve its acceptability and stability as a cooking oil in order to increase its use in other countries. In Spain, research is underway to develop an ion-exchange procedure for removing pro-oxygen from the oil to improve its flavor and stability. Such a procedure would enable a processing procedure to be carried out without the necessity of any objectionable additions to the oil. Sterols also have been suspected of being responsible for off-flavors and odors in soybean oil. Research in Poland may determine the role of sterols in producing these undesirable effects.

New and improved uses of wheat should increase the sale of this American product in other countries. In Israel, a study is being conducted to ascertain whether new industrial starches can be developed by introducing fluorine into starch and starch products. The effect of various phosphorus compounds on the solubility of proteins in baking flours is being investigated in France. In Italy, an attempt is being made to determine how cereal grains may be used in a fermentation process to produce vitamin B_{13}, an important factor in proper nutrition.

Flame-resistant cotton

The competitive position of cotton may be improved by finding new processes to make cotton fabrics more acceptable or to improve present processing methods. In England, they are studying the mechanism of the burning of

At the Hebrew University of Jerusalem pots of brachyblast buds from pruned trees are being checked in a project to develop techniques for vegetative propagation of pines.

cotton cellulose. When this mechanism is fully understood, it will lead to methods for developing flame-resistant treatments for cotton fabrics. The effect on cotton fabrics of such chemical treatments as dyeing and water-proofing is being studied in Sweden. The Netherlands is working on physical and chemical modifications of cotton fabrics to make them useful for specific purposes.

Forestry research is being carried on under P.L. 480 in 13 countries. This is of concern to America because new and improved procedures for propagating forest trees could materially speed up the development of seedlings for outplanting in reforestation efforts. Chile, for instance, is investigating the use of artificial light to stimulate growth responses in pine cuttings. Israel is trying to develop techniques for propagating pine trees from pine needle cuttings which would eliminate the necessity of seed collecting, seed germination, and transplanting in nurseries. It would also be possible to reproduce rapidly offspring of the most desirable parent trees.

As a means of protecting forest trees from the damaging effects of insects, research has been initiated in Finland to discover what substances in forest trees make them attractive to insect pests. This would permit the establishment of baited traps to destroy insects at central stations.

Forest pest control

Surveys are being made in India, Pakistan, and Spain to locate natural enemies of economic forest insects that may be safely introduced into the United States to aid in the biological control of forest pests. Particular attention is being given to finding parasites or predators of the gypsy moth, a serious pest in our northeastern forests, the balsam wooly aphid, and boring insects that attack poplars.

The great losses suffered by U.S. forests through fire have prompted a research project in Spain to obtain new scientific knowledge of selected mechanisms of combustion and fire propagation that can be applied to the development of new or more effective techniques for the prevention and control of forest fires.

Among the 130 research projects going on in 18 countries which are grouped under the heading of production research are those dealing with the protection of farm animals and crops in the United States from exotic diseases or pests that might accidentally be introduced. Study of these production hazards in their native habitat offers a means of building up knowledge of their nature and means of transmission should they reach the United States.

African swine fever, a devastating disease of swine, has spread from its native habitat of Africa to Europe and thus poses a serious threat to the U.S. swine industry. A research project in Spain is designed to develop a rapid accurate method for diagnosing this disease so that it can be differentiated from hog cholera, a disease which it closely resembles.

Plant disease resistance

In India, Pakistan, Poland, and Uruguay, other surveys are being conducted to find parasites, predators or pathogens of damaging insects found in the United States. If these agents can be safely introduced into the United States, they should assist in reducing the amount of chemicals now used to protect crop plants from insect damage. In Egypt, an attempt is being made to induce sterility in male Mediterranean fruit flies. If this can be effected on an efficient scale, the release of sterile males will effectively reduce the population of these very injurious insects.

The search for economic plants, or their wild relatives, that are resistant to diseases and insects offers the possibility of introducing new germ plasm into the breeding efforts of U.S. plant breeders. A number of projects are active in this subject matter field—including sources of rust and nematode resistance of plants in Poland and Spain; disease-resistance of barley, oats, and related species in Israel; and resistance to wheat rust in Egypt.

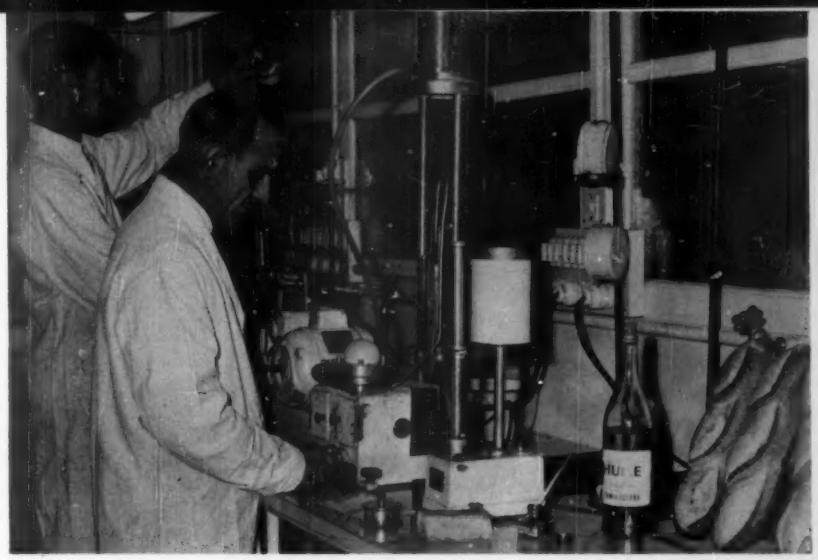
The fire ant has become a serious pest in Southeastern United States. To develop control measures for this pest, a research project has been initiated in Uruguay to study the life history and habits of the fire ant under different climatic conditions. Efforts will be made to ascertain which native plants are attractive to ants and what chemical compounds in these plants make them attractive. A search will also be made for parasites, predators, and diseases of the ant that may be helpful in their control.

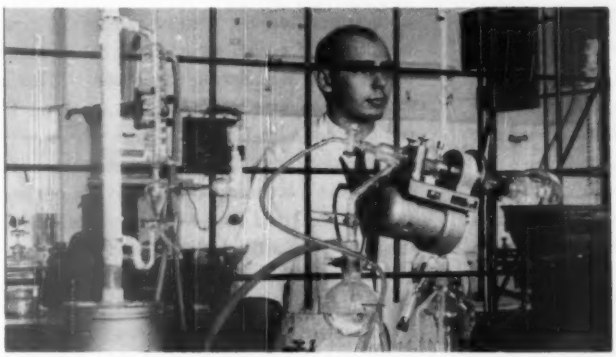
An Indian institution is studying the enzymatic mechanism whereby carbon dioxide is fixed by the green leaves of a plant. The transformation undergone by the immediate compounds leads to the ultimate formation of starch. Another Indian institution is investigating the physiology of the reproductive organs of seed plants. If proper conditions of nutrition, light, temperature, and humidity can be developed for inducing growth of unfertilized ovules, it will materially advance the techniques of plant breeders.

In Brazil, a project is under way to collect and evaluate tropical and sub-tropical legumes which might improve pastures in the Southern United States. Projects concerned with screening native plants of other countries to

The alveograph in the Paris laboratory at right blows bubbles through dough. If a bubble is big before it bursts, the wheat is strong.

Scientists at Milan, below, are looking for ways to produce Vitamin B_{12} from cereal grains.





find new oil, fiber, or feed crops for American farmers are in progress in Colombia, Israel, Pakistan, Spain, Turkey, Uruguay, and Yugoslavia. Samples of collected materials are sent to the United States for detailed chemical analysis.

Better marketing techniques

The goal of 23 research projects under way in 13 countries on agricultural marketing is finding better ways to maintain the quality of farm products by protecting them from deteriorating influences in marketing channels. The development of objective tests for measuring quality is necessary to make marketing procedures more accurate.

A study is being made in England to determine how temperature, concentration of carbon dioxide, and of oxygen, affects apple respiration in a controlled environment. Information derived from this research will assist in developing better storage conditions for apples.

An institution in Italy is investigating the changes that occur in fruit during storage and determining the usefulness of x-ray techniques for detecting these changes. This subjective measure, when perfected, will help to eliminate controversies brought about by individual differences in evaluation of the quality of the product being marketed.

The protection of agricultural commodities in storage frequently requires the use of fungicides and insecticides. The useful life of these chemicals and their resulting effects on product quality should be known. In Finland, research is being conducted to determine the stability of insecticides and fungicides applied to crops after harvest, during the marketing, processing and preservation stages, and their ultimate effect on food quality. The effect of ethylene-dibromide fumigated feeds on the animals to which they are fed is being studied in Israel.

Mites are serious pests of grain, cheese, cured meats, spices, and other stored agricultural products. These pests are difficult to control under most storage conditions. Research is under way at a Polish institution to determine the effect of certain nutritional, environmental, and physical factors on the biology, physiology and susceptibility to acaricides of mites that attack stored products.

Farm economics

Information to help American farmers meet various economic problems is being sought in 4 countries under P.L. 480 grants.

The comparative advantage of forestry and agriculture under specific types of sub-arctic conditions, such as soil, topography, and climate, and with varying cost-price relationships for farm services and products, is being studied in Finland. This analysis can be of potential usefulness in dealing with the development of agricultural resources in Alaska. It will also contribute to the knowledge of comparative advantages of forestry and agriculture.

A study going on in Colombia relates to the rice market structure, the costs and margins, and the potentials for improvement in marketing efficiency. This information will be of interest to the United States in connection with the evaluation of our trade in farm products.

Japan's Dollar Wheat Market

Before the war the Japanese ate little wheat. Today bread is competing with rice in the Japanese diet, and the country ranks as one of the world's best wheat markets.

To many Westerners it is incongruous to conceive of any Asian nation, whose population for centuries has lived on a diet made up largely of rice, becoming a market for substantial quantities of wheat. Yet this is exactly what happened in Japan.

The dramatic change stems from the years immediately after World War II when Gen. Douglas MacArthur, as occupation commander, was faced with the tremendous task of bringing order out of chaos in the civilian economy. The procurement of food to feed Japan's 75 million people had priority over everything else, and the General was said to have cabled the President, "Send me wheat or send me more troops."

The answer was forthcoming immediately in cargo after cargo of wheat and flour. And through this humanitarian response to the needs of Japan for sustenance, millions of Japanese people learned to eat foods made with wheat.

Japan's economic recovery, as everyone knows, was one of the miracles of the postwar period. By 1957 Japan no longer had any need for large-scale food shipments from the United States under our government programs. It was now a hard-currency country, and its wheat markets were once again open to competitors.

Wheat consumption triples

Japan's prewar consumption of wheat was about 30 pound per person per year, and most of it was eaten in the form of noodles. The wheat was grown largely in Japan, supplemented by small quantities of soft white wheat from the United States. By 1960 the estimated consumption of wheat had increased threefold—to 90 pounds per capita.

While the consumption of the traditional noodles rose slightly, what had the greatest impact on the demand for wheat was the growing popularity of white bread. Today an estimated 40 percent of the total wheat consumption is for bread, whereas before the war the percentage was very low. This trend is continuing, and market observers are confident that the figures for wheat consumption may soon show bread in first place and noodles second.

This transition in market requirements—from soft wheat for noodles to hard wheat for bread—caught the United States with inadequate marketing channels. By 1959 the U.S. share of this growing market had dropped from 59 percent in 1956 to 39.5 percent. And our loss was a big gain for Canada, which was in a position to sell hard wheat, via Vancouver.

It was at this point—in 1959—that the U.S. Department of Agriculture cooperating with U.S. wheat growers and exporters opened a frontal attack on the problems that were hampering our wheat shipments to Japan.

The biggest obstacle was geographical. Most of our high-quality hard wheat is grown in the Great Plains area, east of the Rocky Mountains—there is some grown in the West but not enough for export. Traditional marketing of this Great Plains wheat was through ports on the Gulf of Mexco, since rail rates to the Pacific were too high.

Reduction of these rail rates took place in two stages, until it reached the present rate of 70 cents per hundredweight from points west of the 100th meridian and south of the Hard Red Spring wheat area. This is essentially the same as the rate to Gulf ports, making U.S. hard wheat competitive with Canadian hard wheat on the West Coast.

A second obstacle to larger sales of U.S. hard wheat to Japan was a technical one involving quality differences between U.S. Hard Red Winter wheat and Canadian Manitoba, which is a hard spring wheat.

Theoretically, the Japanese bread-flour requirements should be very close to our own. The bread-baking industry in Japan is very modern and is located mainly in the large cities. Equipment is either U.S.-manufactured or very similar, with high-speed mixers, traveling ovens, and temperature-controlled dough rooms. In addition, there is an excellent baking institute in Tokyo for training bakers.

To shift to a greater percentage of our hard wheat in the milling blend of bakers' bread flour requires minor adjustments in dough formulas of enzimatic and oxidative supplements. Once these are thoroughly understood and applied, as many Japanese bakers have discovered, a better quality of bread results. For the large mechanized bakeries, there is an asset in the pliability of the bread doughs.

Backbone of our sales

Though the United States is striving to expand its hard wheat market in Japan, our Western white wheat comprises the backbone of our sales to that country—67 percent in the 1961-62 marketing year.

Competition for Japan's soft wheat market is keen. The country produces a large crop of soft wheat and imports considerable from Australia as well. However, the quality reputation of our Western soft wheat from Washington, Oregon, and Idaho is almost fantastic. Japanese millers are willing to pay premiums to the Japanese Government—which has a monopoly in the purchase and resale of all imported wheat—for it.

Thus, the optimism for increased sales of U.S. wheat to Japan begins with this foundation of a solid demand for our soft wheat. Coupled with it is a bright future for substantially larger sales of hard winter wheat, reversing what has been a downward trend in the U.S. share of Japan's wheat market.

—EDWARD F. SEEBORG

Operated by the Abi Jaoudi-Azar Trading Corporation, Monrovia's new supermarket is modern in design. Store is popular with local people as well as foreigners drawn to Liberia by development of its iron ore deposits.

Liberia Opens Its First Supermarket

U.S. food trade alerted to new market by FAS. As a result, some 70 percent of the products on the shelves now carry American brand labels.

Liberian, delighted with the pick-and-choose way of buying, selects a package of oatmeal. Country is considered a good market for U.S. frozen foods, canned goods, and cigarettes.

Pushing a cart while his wife shops, U.S. Ambassador Charles E. Rhetts opens the new store.

MARKET DEVELOPMENT
and export programs

1963 Market Development Promotes U.S. Farm Exports in 48 Countries

The joint government-industry program to expand U. S. agricultural exports will move forward on a broad front in 1963, creating additional opportunities for American business firms to sell food and other farm products abroad.

That's the outlook for the year ahead as seen by USDA officials in charge of the agricultural market development program, which functions primarily in the dollar areas that account for nearly 70 percent of annual U.S. agricultural exports.

Work is being done by 50 trade and agricultural groups cooperating with the U.S. Department of Agriculture in 48 foreign countries.

Promotion varies

The techniques used are for the most part those tested by time in U.S. merchandising, such as press and radio publicity, distribution of literature and samples, training schools and seminars, contests, style shows, point-of-sale promotion, posters, and advertising. Others are particularly adapted to international selling, such as international trade fair exhibits, foreign trade centers in London and Tokyo and trade-sponsored visits of foreign buyers to the United States.

Cotton and tobacco groups, pioneers in overseas promotion, have redoubled their efforts. Other commodities now being actively promoted overseas under the program include soybeans and soybean products, poultry, dairy products, dairy and beef cattle, citrus fruits, dried fruits, cranberries and red cherries, wheat, flour, feed grains, rice, seeds, dry beans, meat products, lard, tallow, hides and skins, and leather. During 1962, processed food promotion was introduced actively into the program on a major scale through a series of test-selling exhibits at international food fairs around the world.

Several factors contribute to a bullish outlook for foreign market development in the period ahead:

One is improved financing. Originally, the government aspects of the program were financed largely with foreign currencies obtained through the sale of farm commodities under Title I of Public Law 480. This seriously limited work in hard-currency countries. Today, that condition has been corrected by increased conversion of soft currencies into hard, supplemented by a Congressional dollar appropriation for agricultural market development.

Since 1954, the U.S. Government has obligated about $55 million for the program and U.S. cooperators and their foreign affiliates over $23 million for a total of $78 million. The portion of program costs paid by industry is increasing every year and for several industry groups equals or exceeds the government cost.

Private promotion expands

Cooperator organizations are stronger than ever before. Another important factor is the greatly increased promotional activity that is being carried out by foreign trade associations and firms dealing in U.S. agricultural products. Individual foreign cotton firms, for example, are spending 7 to 10 times as much for advertising as is being spent in Italy by the Cotton Council International—the U.S. cooperator. This multiplier principle can be seen throughout the programs of various commodities, and much of it results from continuous stimulation and assistance from the U.S. trade groups.

Though some problems remain, the long-range outlook for U.S. agricultural exports is almost certainly favorable in the years lying ahead.

Japan's Spinners To Quintuple Their Cotton Promotion Funds

Japan's cotton spinning industry, alarmed at the rapid advance of manmade fibers in the Japanese market, plans to spend five times as much for promotion in 1963 as in 1962.

The All Japan Cotton Spinners Association (AJCSA) has allocated the equivalent of $830,000 for a new "self-help" market promotion program. This is more than twice the amount — $400,000 — provided for promotion under the cotton market development project being operated in Japan cooperatively by the USDA, the Cotton Council International, and the Japan Cotton Promotion Institute. Foreign currencies generated by P.L. 480 sales of agricultural commodities provided by the U.S. Department of Agriculture, and matched on a fifty-fifty basis by the Japanese industry group, are used in financing the existing project. CCI provides technical and supervisory services for the project. The cooperative project is being continued; thus, the Japanese industry will be investing more than one million dollars in 1963 to promote the development of new and expanded uses of cotton products in Japan.

AJCSA officials credit the P.L. 480 project with convincing the spinners that promotion can be of value to them in solving their problems. Before the project began, the industry had done little institutional promotion, relying on "a quality product at a fair price" to sell itself. Now, however, the rapid gains made by manmade fibers in total domestic consumption have proved, officials say, that a do-or-die effort is necessary.

The manmade fiber firms in Japan are now putting some $23 million a year into advertising, as against $8.3 million in private promotion by the "big 10" cotton spinners.

U. S. Participates in German "International Green Week"

U. S. trade groups representing rice, soybeans, poultry, and dairy products will take part in the annual "International Green Week" January 25 through February 3 in Berlin.

Wheat Associates Awarded Commendation by Japanese

The Japanese Government recently awarded Wheat Associates, USA, Inc. a certificate of commendation for their leadership and assistance in Japan's nutrition education program. Above, Welfare Minister Eiichi Nishimura presents the award to James Hutchinson of the Wheat Associates—the first foreign organization in Japan ever to receive the commendation.

Nine years ago, the Oregon Wheat Growers League—predecessor to the Wheat Associates—launched the nutrition program by sending into rural areas "kitchen buses," whose operators showed Japanese housewives how to prepare well-balanced meals. The audience sampled them and took home recipes and pamphlets about nutrition education.

The "bus" technique proved so successful a means of reaching people that since 1961, the Japanese have taken over the buses.

U.S. Feed Grains Council Will Open Madrid Office

The U.S. Feed Grains Council will open a new office in Madrid January 15. Targets for its market development program will include Portugal, as well as Spain.

One of the liveliest dollar markets in Europe for U.S. corn and other feed grains, Spain is expected to purchase more than 12 million bushels of U.S. feed grains in fiscal year 1963, according to the Council's Executive Vice President, C. D. Palmby. While Portugal is still a relatively small market, it has real potential.

Nonfat Dry Milk Has Market Potential In Nigeria, According to U.S. Dairy Survey

Nigeria could be a substantial market for U.S. nonfat dry milk in the future, says USDA Marketing Specialist W. Bruce Silcox, one of a 3-man team just back from a month's survey of market conditions.

The group, which included Dr. Truman Graf, Professor of Agricultural Economics at the University of Wisconsin and John A. Moser, President of the Kyana Milk Producer's Association at Louisville, Kentucky, covered most of the country in an effort to assess Nigeria's potential as a market for U.S. dairy products. Ministers of Health, Education, and Agriculture at both the Federal and Regional level expressed interest in the inclusion of nonfat dry milk in the country's school lunch program.

The United States, which now sends Nigeria approximately 600,000 pounds of dry milk annually for donation through the United Nations' Children's Fund and various welfare organizations, would like to convert this program to concessional sales of nonfat through Title IV, P.L. 480, and eventualy into commercial sales.

Principal stumbling block is Nigeria's present low per capita income which keeps annual milk consumption to 34 pounds per person, compared with 314 in the United States.

Dr. Silcox believes that demand should be encouraged by extensive consumer education programs and that producers should stress the sale of nonfat, at least for the time being, in the smaller cheaper packages.

Markets To Watch—

Liberia's Growing Economy Should Push U.S. Cigarette Imports to $2 Million

Liberia is today the second largest market in Africa for U.S. cigarettes. Its imports of U.S. cigarettes are expected to hit the $2-million mark in 1963—more than tripling the $660,000 worth imported in 1959. Exports of cigars and smoking tobaccos have also increased sharply in that period.

A variety of factors are responsible for the market's growth, though none is more important than the increasingly widespread rise in purchasing power. Liberia has one of the best currency positions in Africa. The U.S. dollar is the country's official currency and exports exceed imports.

Liberia has an abundance of some of the world's richest iron ore deposits. Large capital expenditures for iron ore mining by foreign investors have generated an economic boom in much of the country. Thousands of Liberians are receiving paychecks for the first time and are buying their first pack of cigarettes.

The population of Monrovia, the capital, is growing rapidly and will soon reach 100,000. About 4 percent of the country's total population are workers from other countries with a high per capita cigarette consumption.

Liberia has no cigarette factories, and less than 50 thousand pounds of tobacco are grown in the country.

About 95 percent of the Liberian cigarette consumption consists of imported U.S. brands. They are sold mostly by hundreds of small boys carrying trays of cigarettes which they offer at 31 to 35 U.S. cents per pack or 2 cents per cigarette. The cigarettes are imported from the United States for about 9 cents per pack.

Monrovia has also become a distributor for U.S. cigarettes to Guinea, Sierra Leone, and the Ivory Coast.

Liberia is one of the best examples in the world of an emerging nation where economic development is opening up a new U.S. market.

Brazil's Coffee Exports Drop Slightly

Brazil, during the current coffee-marketing year (July 1-November 30, 1962), has exported 7,478,052 bags (132.3 lbs. each). This compares to 7,989,721 bags exported during the same period of the past coffee year.

Coffee exports from Brazil during November 1962, however, were higher than they were the previous November—1,712,240 bags compared to 1,504,297 bags.

Greece Organizes New Coffee Pool

A pool of Greek coffee importers has been organized in cooperation with the Brazilian Coffee Institute. The pool is granted exclusive right to buy Brazilian coffee for importing, half of it at reduced prices.

Greece imports about 130,000 bags (132.3 lbs. each) of coffee per year, and of this, Brazil now supplies about 75 percent.

Canada Uses Less Cotton in November

Canadian cotton consumption (based on bales opened by mills) was 35,000 bales of 500 pounds gross in November, as against 38,000 in October and 36,000 in November 1961.

Consumption in the first third (August-November) of the current season amounted to 135,000 bales. This was slightly below the 137,000 opened in the same months of the previous year, but well above the corresponding average of 125,000 for the past 5 seasons.

EXIM Bank Loan Set for Greek Cotton Mill

Greece's cotton textile industry is augmenting its capacity by the building of a 36,000-spindle mill at Patras.

On December 21, the Export-Import Bank of Washington announced the authorization of a $3-million loan to a Greek corporation, the proceeds to be used in purchasing U.S.- built equipment for the new project.

The mill's annual yarn output of about 3,800 metric tons will be aimed at the Common Market where Greece—in view of its associate membership—will have duty-free access. Traditionally, the Common Market countries have taken about 30 percent of the U.S. cotton export total.

1962 French Milk Output Holds Steady

French officials expect milk production in 1962 to reach 52 billion pounds, equaling the record output of 1961.

Because of a 3-month drought in southern France, it was anticipated that production would be well below that of last year. However, above-normal production in Normandy—France's principal dairying area—permitted total production to be maintained.

CORRECTION

In the article, "West German Poultry Imports Drop Sharply" (published in *Foreign Crops and Markets,* December 17, 1962), it was stated that total imports for August through October were 642 million pounds in 1962, compared with 1,225 million pounds in 1961. This should have read "64.2 million pounds in 1962, compared with 122.5 million pounds in 1961."

Argentine Flaxseed Crop Near Last Year's

Argentina's 1962-63 flaxseed crop is 32.7 million bushels, according to the first official estimate. This is one percent larger than last year's outturn of 32.2 million bushels but about 8 percent smaller than most earlier private estimates of around 35 million bushels. Yields in Cordoba and Santa Fe Provinces did not appear to meet expectations, but estimates may later be revised upward.

In view of the relatively substantial production, the government has announced that an export quota of not less than 30,000 metric tons (1.2 million busheds) of flaxseed is being considered. No exports have been permitted since the last quota period, ended on April 30, 1962.

An upward revision of support prices for the current crop, from 925 pesos to 1,000 pesos per quintal, also was announced. However, this price is still considerably below current domestic market levels. Applying the "spot" exchange rate of mid-December (around 150 pesos per U.S. dollar) the new support price of 1,000 pesos per quintal is the equivalent of about $1.70 per bushel in U.S. money.

Germany Extends Import Tender for Beans

The West German import tender for canned wax beans from the United States, Canada, and Israel, which was due to expire on December 26, has been extended. Applications for import licenses may now be submitted through March 15, 1963, and licenses will be valid through March 31, 1963.

There is an undisclosed value limit which, if reached prior to the above dates, could stop imports earlier.

Germany Is Accepting Canned Asparagus

Canned asparagus cuts and tips from the United States, Australia, Japan, Canada, and Peru may now be imported into West Germany. Applications for import licenses will be accepted until the undisclosed value limit is reached or through June 28, 1963. Licenses are valid from January 1 to June 30, 1963.

Cuts must be a minimum of 5 cm. (1.97 in.), and tips, 6 cm. (2.4 in.), making up at least 15 percent of pack.

Danes Give Apple-and-Pear Import Dates

Denmark has announced the opening of its border for imports of apples and pears. Pears will be accepted from February 1 to July 15 and apples from May 1 to July 15. If the domestic supply and price situation should require earlier apple imports, the period may be amended to begin April 1. However, this new amendment is subject to later determination.

Mexican Vegetable Shipments Reported

From November 16 through November 30, the following quantities of winter vegetables from the West Coast of Mexico crossed the border at Nogales, Arizona (in thousands of pounds, with last year's figures in parentheses): snap beans, 234 (222); sweet corn, 19 (3); cucumbers, 11 (268); eggplant, 70 (35); peas, .3 (.8); peppers, 111 (161); squash, 11 (0); and tomatoes, 782 (884).

Peru's Cigarette Output Rises; Sales Down

Latest available data show that cigarette output in Peru during 1961 totaled 2,433 milion pieces. This represents an increase of 9.7 percent from the 2,236 million pieces which had been produced in 1960.

Sales of cigarettes totaled 2,657 million pieces, compared with 2,780 million in 1960. However, sales of imported cigarettes rose from 380 million pieces in 1960 to 425 million in 1961.

Turkey Keeps Tobacco Export Price Floor

The Administrative Board of the Federation of Turkish Tobacco Dealers has decided not to lift the minimum price restriction for sales abroad of the country's manipulated tobacco. No export license will be issued for transactions under 1.55 dollars per kilogram (70.3 U.S. cents per pound) for American Grades.

The Board also discussed the opening date of the new season's tobacco market, and a date around the first week in January is being considered. *(Ticaret Journal of Commerce,* Izmir, November 26, 1962).

More 1963 El Salvador Tobacco Seen

The 1963 tobacco harvest in El Salvador is reportedly forecast at 2.9 million pounds, compared with 2.4 million in 1962. This preliminary forecast is based on increased plantings of both flue-cured and burley.

Flue-cured production is estimated at 1.75 million pounds, compared with 1.54 million last season. The rise reflects increased demand for bright leaf tobacco in El Salvador.

The production of burley is forecast at 750,000 pounds, compared with the 1962 harvest of 507,000 pounds. Production of dark air-cured types is expected to approximate the 400,000 pounds harvested the season before. Also, there is some reported interest in trying to grow filler-type cigar leaf for export to the United States, but no actual plantings have been reported to date.

Exports of Most Livestock Products Fall

October exports of all U.S. meats except canned sausages and lamb and mutton were smaller than in 1961, and so was the January-October total for all meats. These smaller exports reflected higher U.S. prices.

October lard exports were sharply down from 1961's; but the total for the first 10 months of 1962 was up because of larger shipments to the United Kingdom. For inedible tallows and greases, however, the 10-month total was smaller than the year before because of reduced shipments to the USSR, South Africa, West Germany, and the Netherlands.

Variety meat exports in October were 12 percent greater than a year before, but the 10-month total rose only 2 percent. More went to France and the Netherlands, but less to the United Kingdom. Exports of all types of hides and skins were lower because of strong demand by tanners and higher prices in the United States.

Livestock Products: U.S. exports of selected items October 1961 and 1962 and January-October 1961 and 1962, with percentage change

(Product weight basis)

Commodity	October		Jan.-Oct.		
	1961	1962	1961	1962	Percent change
	1,000 pounds	*1,000 pounds*	*1,000 pounds*	*1,000 pounds*	*Percent*
Lard	34,400	20,894	340,597	356,775	+5
Inedible tallow and greases[1]	135,126	109,366	1,492,559	1,372,371	−8
Edible tallow and greases[2]	1,180	962	10,222	10,513	+3
Meat:					
Beef and veal	2,445	2,007	25,233	21,734	−14
Pork	5,566	5,076	56,258	50,174	−8
Lamb and mutton	87	95	1,367	1,871	−37
Sausage:					
Except canned	76	125	2,054	1,263	−39
Canned	79	72	865	689	−20
Baby food canned	96	115	983	848	−14
Other canned meats	91	111	901	1,023	+14
Total red meat	8,440	7,601	87,661	77,602	−11
Variety meat	12,604	14,155	101,873	104,252	+2
Sausage casings:					
Hog	1,289	650	9,309	10,373	+11
Other natural	944	800	5,518	4,960	−10
Mohair	1,094	1,047	12,384	11,100	−10
Hides and skins:					
	1,000 pieces	*1,000 pieces*	*1,000 pieces*	*1,000 pieces*	
Cattle	594	581	6,221	5,916	−5
Calf	104	140	1,740	1,464	−16
Kip	35	32	459	283	−37
Sheep and lamb	252	170	2,061	1,792	−13

[1] Includes inedible tallow, oleic acid or red oil, stearic acid, and other inedible animal greases, fats, and oils [2] Includes edible tallow, oleo oil and stearin, oleo stock and shortenings, and animal fat, excluding lard.

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